

APPOINTMENT DATE (if applicable): _____

Client Information Form Tax Year 2022

Date Submitted: _____

Which tax preparer do you prefer? Circle one:

Bart **Craig** **Rochelle** **No Preference/ First Available**

1) Primary Tax Payer Info			2) Spouse Info		
Full Name			Full Name		
SSN		DOB	SSN		DOB
Mailing Address			Mailing Address (if different from tax payer)		
City	State	Zip Code	City	State	Zip Code
Phone Number			Phone Number		
E-Mail Address			E-Mail Address		
Occupation Title			Occupation Title		
Drivers License # (if new OR expired in 2021)			Drivers License # (if new OR expired in 2021)		
Issue Date		Expiration Date	Issue Date		Expiration Date

Marital Status - Single Married- Joint
 Married- Separate Head of Household

Can anyone claim you as a dependent? Yes
 No

Direct Deposit Information for Refunds:
If your account # is the same as last year, please write the last four digits here: _____
Account # (if new): _____
Routing #: _____
Name of Bank: _____
Checking Account or **Savings Account**

WHEN DROPPING OFF YOUR PAPERWORK, PLEASE HELP US SPEED UP THE TIME PROCESS BY HAVING ALL TAX DOCUMENTS READY AND OUT OF THEIR ORIGINAL ENVELOPES. THANK YOU!

3) Dependents: List the names of ONLY the dependents you can claim & check the box next to their name if they are a full time college student.

Name:	Student:	Relationship: (only if new)	SSN: (only if new)	DOB: (only if new)
	<input type="radio"/>			
	<input type="radio"/>			
	<input type="radio"/>			
	<input type="radio"/>			
	<input type="radio"/>			
	<input type="radio"/>			

4) Your Income Tax Situation: Select all that apply to you or your spouse.

Do you rent your home or own your home? Rent Own

Income Sources:

- W2 Income - List # of W2 forms: _____
- Unemployment
- Social Security Income
- Retirement/ Pension
- Interest Income
- Dividends
- Stock Sales
- Self Employment Income/ 1099-NEC (Be sure to include a list of expenses to help decrease your Self Employment Tax)
- Rental Property
- Virtual Currency

- Gambling winnings of \$600 or more

Household / Dependents:

- College tuition (**must provide 1098-T form**)
- Paid student loan interest (**1098-E form**)
- Enrolled in a health insurance plan through Covered CA or the exchange market place (**must provide 1095-A & 3895 form**)
- Paid for child care/ daycare (**if you checked this box, and did not enclose a form with information, please list the amount paid, name, address, and EIN or SSN of the provider you use under the comment section**)

Miscellaneous:

- Sold or purchased a home (must provide final closing cost statement)
- Paid or received alimony prior to Jan. 1, 2020
- Purchased a brand new electric vehicle or solar panels (must provide year, make, & model of vehicle and purchase price of solar panels.)

We will contact you if we have any questions or suggestions regarding your income tax situation. If you would like a phone call to discuss specific matters while we are working on your return, please briefly list your questions or concerns below, as well as your phone number and the best time to call.

Phone # _____ Best Time to Call: _____

Comments, questions, or notes you have for us:

Your Signature: _____

Date: _____

By signing, you recognize that you have thoroughly read through this form and if items were left off after your final tax return has been completed, you may be subject to a re-print fee.

Thank you for your continued business! We greatly appreciate you and hope you have a wonderful and healthy year.